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PRACTICE MANAGER ' SCHEDULER ' ENTRY POINT ' CLINICAL

NEW YORK STATE IMMUNIZATION INFORMATION SYSTEM (NYSIIS) SETUP INSTRUCTIONS

The New York State Immunization Information System (NYSIIS) is a free, web-based statewide immunization information system, also called a registry, which maintains computerized immunization data of persons of all ages in a confidential and secure manner.

Effective January 1st, 2008 all immunizations administered to children less than 19 years of age must be entered into the NYSIIS within 14 days of administration. This includes all vaccines administered in accordance with the Advisory Committee on Immunization Practices (ACIP) recommended schedule, as well as any additional vaccines administered to persons less than 19 years of age after January 1st, 2008.

Users will access the NYSIIS through the NYSDOH Health Commerce System (HCS). All NYSIIS users are required to have an individual HSC user account. You can apply online at **https://hcsteamwork1.health.state.ny.us/pub/top.html** by selecting the Apply for HCS Medical Professions account link. You may designate a user to be the HCS Coordinator for the practice. The HCS Coordinator obtains and manages the medical practice user accounts on the HCS and is the principal point of contact concerning HCS access. It is recommended that offices designate at least two HCS coordinators.

If you have any questions or require additional information regarding the NYSIIS you can call (518)473-4437 or email nysiis@health.state.ny.us.

CLINICAL IMMUNIZATION

The Immunization section within the Clinical system of Practice Manager allows you to maintain structured records for a patient's immunization information. The following topics will detail how to setup the Immunization portion of the Clinical system. When an Immunization Type and Group Procedures are configured, the Immunization Record will display any applicable immunization entries in the Booster Series Column. If Group Rules are configured in addition to the Immunization Type and Group Procedures, the Immunization Record will display any applicable immunization entries that meet the specified rules for the first sequence in the Basic Series column, all other entries will appear in the Booster column.

Configure Procedures for Immunization
This would be the **minimum** that you would have to do if you do not wish to create Immunization Types, Group Procedures and Group Rules. A listing of Vaccine Codes accepted by the NYSIIS can be found in the NYSIIS Flat File Transfer Specification which can be downloaded by going to http://www.health.ny.gov/prevention/immunization/information_system/providers/data_exchange_information/docs/nysiis_specs_flatfile.pdf or can be found in the NYSIIS HL7 – 2.4 Transfer Specification which can be downloaded by going to http://www.health.ny.gov/prevention/immunization/information_system/providers/data_exchange_information/docs/nysiis_specs_hl7_24_realtime.pdf. Procedures need to be configured for Immunization so that the system will automatically update and enter an Immunization entry for the patient whenever a charge with an applicable procedure is entered. Use the following steps to add procedures for Immunization.

1. Click **Add-Ins → Clinical → Immunizations → Procedures**.

2. In the Available Procedures column select any procedures that will be used as part of the Immunization system. To select more than one procedure to move at one time click on the first procedure, and then hold down the Ctrl key as you click the remainder of the desired procedures.

3. Click the **Add>>** button.

4. Once the applicable procedures have been selected, click the **Save** button.

Configure Immunization Type Information

An Immunization Type can be created for each type of vaccine administered, example Varicella, Hep A, Hep B, DTAP, Hib, Flu, MMR, etc. It's a category to which certain Group Procedures and/or Group Rules will be applicable when tracking immunization records for patients. Use the following steps to configure an Immunization Type.

1. Click **Add-Ins → Clinical → Immunizations → Group Setup**.

2. In the Code Table Maintenance - Immunization Type screen, click the **New** button.

3. Enter a **Code Value** for the immunization type.

4. Enter a **Description** for the immunization type.

5. Click the **Add To List** button.

6. Repeat steps 2 – 5 to add additional vaccines.

7. Click the **Save All** button when finished.

Configure an Immunization Group for an Immunization Type

An Immunization Group is a particular set of procedures that are classified under an Immunization Type. Use the following steps to add procedures to an Immunization Group for an Immunization Type.

1. Click **Add-Ins → Clinical → Immunizations → Group Procedure**.

2. In the Select Code - Immunization Type screen, select the **Immunization Type**, and then click the **OK** button.

3. In the Available Procedures column select any procedures that are used for this Immunization Type which will be used as part of the Immunization Group. To select more than one procedure to move at one time click on the first procedure, and then hold down the Ctrl key as you click the remainder of the desired procedures.

4. Click the **Add>>** button.

5. Once the applicable procedures have been selected, click the **Save** button.

6. Repeat steps 2-5 for the remaining Immunization Types.

Configuring Immunization Rules for an Immunization Type

An Immunization Rule allows you to set up specific guidelines to be followed for the Immunization Type as they are added to the patient's record if desired. Use the following steps to create a new Immunization Rule for an Immunization Type.

1. Click **Add-Ins → Clinical → Immunizations → Group Rules**.

2. In the Select Code - Immunization Type screen, select the **Immunization Type**, and then click the **OK** button.

3. In the Immunization Rule screen, click the **New** button.

4. Select the **Age Type** for this immunization rule.

5. Enter the **Age Start**, **Age End**, **Shots**, and **Seq #** for this immunization rule.

6. Click the **Add to List** button.

7. Repeat steps 3 - 6 to add any additional rules for this Immunization Type.

8. Click the **Save All** button when finished.

9. Repeat steps 2-8 to add rules for the remaining Immunization Types.

Configure Manufacturer Information

The manufacturer is the company or entity that produces the vaccine for immunizations that is used in conjunction with the NYSIIS. A list of Manufacturer codes accepted by the NYSIIS can be found in the NYSIIS Flat File Transfer Specification which can be downloaded by going to http://www.health.ny.gov/prevention/immunization/information_system/providers/data_exchange_information/docs/nysiis_specs_flatfile.pdf or can be found in the NYSIIS HL7 – 2.4 Transfer Specification which can be downloaded by going to http://www.health.ny.gov/prevention/immunization/information_system/providers/data_exchange_information/docs/nysiis_specs_hl7_24_realtime.pdf.   Use the following steps to create a new Manufacturer for Immunizations.

1. Click **Add-Ins → Clinical → Immunizations → Manufacturers**.

2. In the IH Code field, enter the **In-House Code** for the Manufacturer you are adding.

3. In the Description field, enter the **Description** for the Manufacturer you are adding.

4. The NJ IIS Manufacturer Code field is not applicable.

5. In the NY IIS Manufacturer Code field, enter the appropriate **Manufacturer Code**.

6. Click the **Save** button.

Configure VFC Eligibility Information

By entering a VFC eligibility code you are specifying the patient's eligibility to receive publicly funded vaccines from the Vaccines for Children or VFC Program. A list of VFC Eligibility codes accepted by the NYSIIS can be found in the NYSIIS Flat File Transfer Specification which can be downloaded by going to http://www.health.ny.gov/prevention/immunization/information_system/providers/data_exchange_information/docs/nysiis_specs_flatfile.pdf or can be found in the NYSIIS HL7 – 2.4 Transfer Specification which can be downloaded by going to http://www.health.ny.gov/prevention/immunization/information_system/providers/data_exchange_information/docs/nysiis_specs_hl7_24_realtime.pdf.   Use the following steps to create a new VFC Eligibility for Immunizations.

1. Click **Add-Ins → Clinical → Immunizations → Eligibility**.

2. In the IH Code field, enter the **In-House Code** for the VFC Eligibility you are adding.

3. In the Description field, enter the **Description** for the VFC Eligibility you are adding.

4. Click the **Save** button.

Configure Immunization Information for a Procedure

In Practice Manager version 4.3 and higher you have the ability to configure immunization information for a procedure. When this information is entered, it will be available to select when entering\editing an immunization in both the Clinical and Practice Manager applications allowing for more efficient and effective entry of this information. Use the following steps to configure immunization information for a procedure.

1. Click **Administration → Transaction Tables → Procedure**

2. In the IH Code field, enter the In-House Code for the procedure in which you would like to configure immunization information.

3. Click the **Immunization** button.

4. The Immunizations Manufacturers & Lot Numbers dialog will appear. If you want to enter a VIS (Vaccine Information Statement) date place a checkmark in the VIS checkbox and enter the applicable VIS date. Click the **New** button and configure the following applicable immunization information:

    o Manufacturer

    o Trade Name

    o Lot Number

    o Lot Expiration

    o Funding

5. When complete click the **Add To List** button, click the **Close** button and click the **Save** button.

Add an Immunization Entry for a Patient

If a particular procedure was not configured at the time of charge entry (available in version 4.3 and higher), or if you need to enter an Immunization entry without adding a charge, you can add it manually in the Immunization tab of the Clinical screen.   Use the following steps to manually add Immunization information for a patient.

1. Click the **Clinical** tab.

2. In the **Account #** field, enter the patient's account number for whom you would like to add a Clinical Data record, or search for it by clicking the Lookup button, or pressing F3.

3. Click the **Immunizations** tab.

4. Click the **New** button.

    Please note: The Immunization entry screen was updated in version 4.3 and higher to include the ability to select immunization information if entered on the procedure screen. See below for a print screen of the Immunization entry screen from version 4.3 and higher and another print screen from prior to version 4.3.

5. In the Immunization screen, enter the **Procedure**, or search for it by clicking the Lookup button, or pressing F3.

6. Enter the **Service Date** for the Immunization Record.

7. If immunization information was entered for this procedure, select the applicable immunization information for this procedure (available in version 4.3 and higher). The immunization information will populate the corresponding fields in the Immunization section below.

    If immunization information was not entered for this procedure or if you are on a version prior to 4.3, enter at minimum the **Manufacturer** and **Lot Number** which are both <u>required for the NYSIIS</u>.

8. Enter any other immunization information as needed.

9. In the Immunization Consent section, enter the **First Name**, **Last Name**, **Consent Date** and select the **Relationship,** if applicable.

In version 4.3 and higher, the **Consent for Immunization** checkbox should be checked if the person named gives permission to administer the immunization and the **Permission to Share** checkbox should be checked if the person named gives permission to share the immunization with the NYSIIS.

In versions prior to 4.3, the **Permission Granted for Immunization** checkbox should be checked if the person named gives permission to administer the immunization.

Please note: Flat File (NYSIIS) - Immunizations for patients 19 yrs and older are not sent to the NYSIIS unless Permission to Share is checked. HL7 (NYSIIS HL7) – Immunizations for patients 19 yrs and older are sent to the NYSIIS even if Permission to Share is unchecked.

10. When finished adding the Immunization information, click the **Save** button.

11. Click the **Next Account** button when finished.

Print screen of Immunization Entry screen from version 4.3 and higher

Print screen of Immunization Entry screen from prior to version 4.3

Edit an Immunization Entry for a Patient

Immunization information will be entered onto a patient's account whenever a configured immunization procedure is entered as a charge. **You must edit the immunization entry to enter the immunization information, at minimum the Manufacturer and Lot Number which are required fields for the NYSIIS.** Use the following steps to edit an Immunization entry for a patient:

1. Click the **Clinical** tab.

2. In the **Account #** field, enter the patient's account number for whom you would like to edit a Clinical Data record, or search for it by clicking the Lookup button, or pressing F3.

3. Click the **Immunizations** tab.

4. Click the **Edit** button.

5. Enter\edit any immunization information as needed. See the section above entitled "Adding an Immunization Entry for a Patient" for information regarding specific fields.

6. When finished editing the Immunization entry, click the **Save** button.

Entering the Patients Mother's Maiden Name

The patients Mother's Maiden Name is another required field for the NYSIIS. Use the following steps to enter the patients Mother's Maiden Name.

1. Click the **Patient** tab.

2. In the **Account #** field, enter the patient's account number for whom you would like to add the Mother's Maiden Name, or search for it by clicking the Lookup button, or pressing F3.

3. Click the **More Patient** button.

4. Enter the patients Mother's Maiden Name in the **Mother's Maiden Name** field.

5. Click the **Save** button and the **Save** button again to save the patient.

Print an Immunization Record for a Patient

Use the following steps to print an Immunization Record for a patient.

1. Click the **Clinical** tab.

2. In the **Account #** field, enter the patient's account number for whom you would like to print an Immunization Record, or search for it by clicking the Lookup button, or pressing F3.

3. Click the **Immunizations** tab.

4. Click the **Preview** or **Print** button.

Printing a Clinical Immunization Report

Use the following steps to print an Immunization Report prior to going into the PCVaccine program to create your files that will be uploaded to the NYSIIS. This report will assist you in determining which immunizations are missing the required, Manufacturer code, Lot Number, and Mother's Maiden Name.

1. Go to **Reports → Clinical → Clinical Immunizations → Standard**

2. In Select Criteria add Service Date, Between and in the Starting and Ending Value enter the dates for which you are going to gather immunizations. You can also add Lot Number, Is Blank or Manufacturer, Is Blank or Mother Name, Equal to, N if you specifically want to see immunizations with this missing information.

3. Scan this report for missing Lot Numbers and Manufacturers. If the Mother's Maiden Last Name is not entered appropriately an N will be reported in the Mother column.

VACCINE REGISTRY MODULE

Practice Manager has a program that permits the export of immunization information into an ASCII file, which can be uploaded to the NYSIIS for processing, it's called the Vaccine Registry module. In order to use this module, your license file must contain the proper permissions. Go to **Help → About Practice Manager**. Under License Information use the scroll bar to view the Licensed Add-ins. **If PCVaccine doesn't appear as a Licensed Add-in you need to create a HDS call asking to have the PCVaccine Licensed Add-in added to the clients license file. Also request the call be transferred back to you once the license file has been updated. Transfer the call to the STI Division, Administration Department, Employee Maddie Kelsey. There is no charge for the PCVaccine Licensed Add-in.**
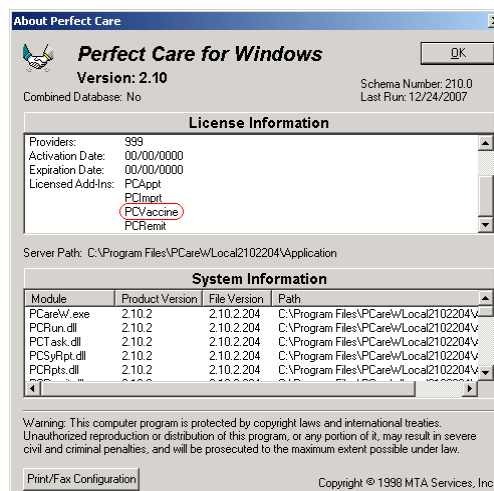
If you attempt to use this program without having the proper permissions within your license file, you will receive a warning message indicating that your current license file does not permit access to this program.

Once you have the proper licensing permissions, use the following steps to setup the Vaccine Registry to be accessed from within Practice Manager:

1. Go to **Add-ins → Run → Configure**.

2. Configure as follows:

   Application Name - Type **PCVaccine Program**.

   Command Line - Click on the Browse button to the right of the field (button with 3 dots) and navigate to the Application folder on the server, locate **PCVaccine.exe**, highlight and click the **Open** button.
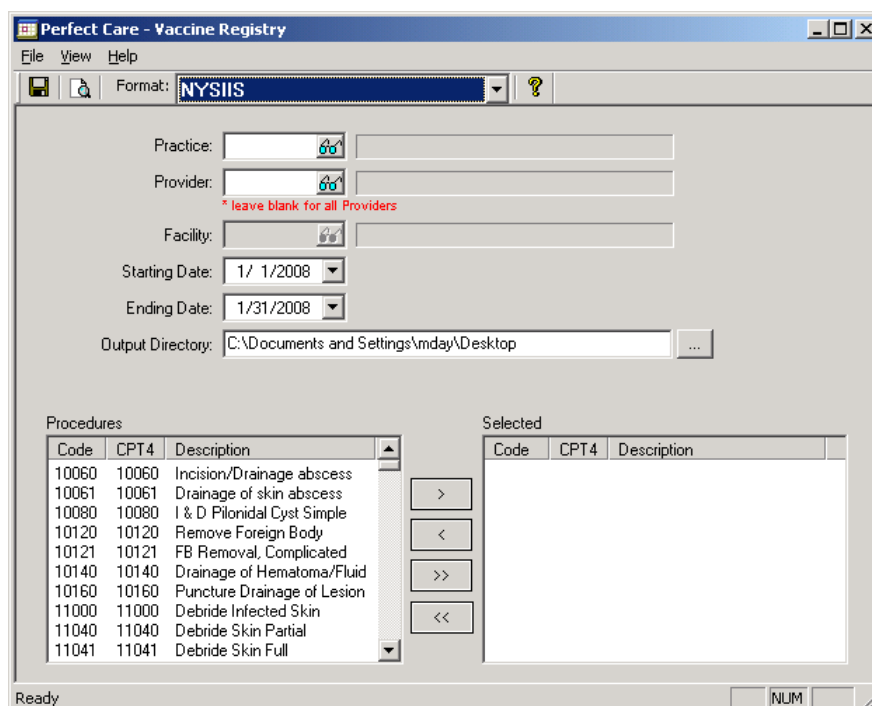
   Starting Directory - Click the Browse button to the right of the field (button with 3 dots) and navigate to the Application folder on the server and click the **OK** button.

3. Click the **Add** button and then click the **OK** button.

Once set up to access you would go to **Add-ins → Run → PCVaccine Program**. You will be presented with a logon screen similar to the one shown on the next page. Select the database that you wish to log into, enter your **User ID** and **Password**, and click the **Logon** button to access the program.

Once the logon procedure has been completed, the main window of the Vaccine Registry program will appear on the screen.

The Main screen of the Vaccine Registry program is divided into three sections. These sections allow you to specify the file format, practice, provider, service dates, output directory and procedure information for which you wish to gather Vaccine information.

The first of these sections contains the command buttons used to preview and/or save the output file after all additional criteria have been specified. In addition, this section contains the format in which the Vaccine file should be saved. You must click on the down down box and select **NYSIIS** if sending in the Flat File format or **NYSIIS HL7** (available in version 4.1.4 or higher) if sending in the HL7 format, version 2.4.

Please note: If office is attesting for Meaningful Use they must select **NYSIIS HL7**. This file will then be uploaded to the NYSIIS as a test file. **That test may succeed or fail; either way it meets the immunization criterion of MU Stage 1.**

The second section contains the fields necessary to specify the In-House codes of the desired Practice and Provider, a Starting and Ending Date and an Output File Path.

To specify a Practice or Provider you may type the appropriate In-House code into the fields provided, or select from a list by clicking the lookup button or by pressing F3. You are required to specify a Practice code; however the Provider field is optional. If you wish to gather information for all providers, the Provider field may be left blank.

To enter a Starting and Ending Date for which information should be gathered, type the dates into the appropriate fields or click on the drop down box and navigate through the months\years using the left and right arrow keys on the calendar and then clicking the desired date.

The Output File Path specifies where you want the file saved and defaults to the users Desktop. If multiple users will be using the PCVaccine program it's suggested that you find a mutual place to save the file so

either user can access it. Click the Browse button if you wish to change the Output File Path.

The third section of the screen contains the fields and buttons that are used to designate which procedures are considered to be vaccinations. This section displays a list of all procedures within the system along the left side, and the list of selected procedures along the right. Information will be gathered for all procedures that appear within the list on the right.
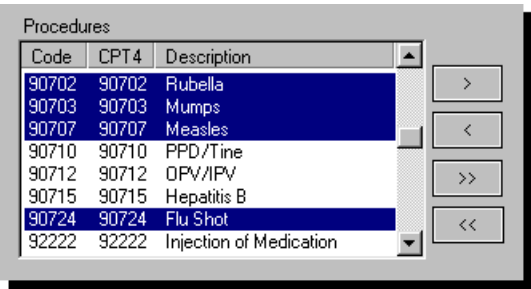

To select a procedure, highlight the desired record on the list entitled Procedures and click the button showing a single arrow pointing to the right (i.e. '>'). This will move the procedure from the list on the left and place it in the list on the right. To select more than one procedure to move at one time click on the first procedure, and then hold down the Ctrl key as you click the remainder of the desired procedures. Once all of the desired procedures have been highlighted, click the button showing a single arrow pointing to the right (i.e. '>').


As each procedure is designated to be a Vaccination procedure, it will appear within the Selected list on the right side of the screen. To remove a procedure from the Selected list, highlight the desired procedure and click the button showing a single arrow pointing to the left (i.e. '<'). This will remove the procedure from the list on the right and place it back into the list on the left. To select more than one procedure to move at one time, click on the first procedure, and then hold down the Ctrl key as you click the remainder of the desired procedures. Once all of the desired procedures have been highlighted, click the button showing a single arrow pointing to the left (i.e. '<').
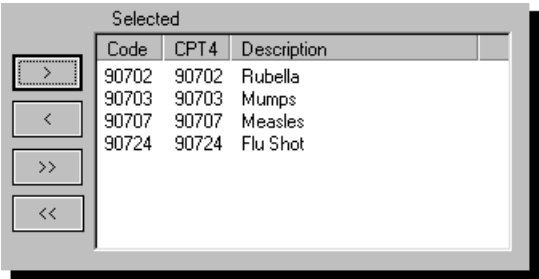
Once all information has been configured as desired the file may be saved. To save an output file using the specified criteria, you may click the **Save** button in the upper-left of the screen, or click the **File** menu and select **Save As**.

Upon selecting either of these options, you will be prompted to enter an Organization ID in the Criteria field. This is the ID of the provider organization that owns the client (patient) and their immunization records. This field is optional if an organization is sending all of it's own records. This field is **required** if using the NYSIIS HL7 format or if an organization other than the organization that owns the record(s) is transmitting the file for the NYSIIS format. **Contact the NYSIIS Help Desk** at (518)473-4437 for the appropriate Organization ID, if unknown. Click **OK** either after leaving the Criteria blank or after entering the appropriate Organization ID.
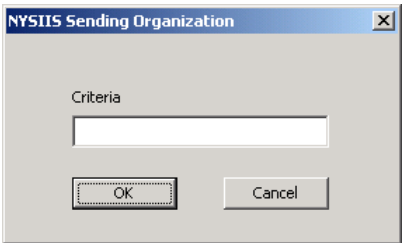
For the NYSIIS format, two (2) files will be created. One containing Patient Information named **VACCINEPAT.ASC** and another containing the Immunization Information named **VACCINEIMM.ASC**. Both will be located in the location specified in the Output File Path field. Both files would be uploaded to NYSIIS.

For the NYSIIS HL7 format, two (2) files will be created. VACCINE.ASC and VACCINE.ZIP, either of which can be uploaded to NYSIIS. Both will be located in the location specified in the Output File Path field.

<u>**PLEASE NOTE**</u>

➢ **<u>A file will not be rejected if an immunization is missing the Patients Mother's Maiden Name, Manufacturer and\or Lot Number however you will need to access the NYSIIS to manually add this information using the user interface to complete the record.</u>**

<u>NEW YORK STATE IMMUNIZATION INFORMATION SYSTEM (NYSIIS)</u>

<u>Configure Run for the New York State Immunization Information System (NYSIIS)</u>
Use the following steps to setup the New York State Immunization Information System (NYSIIS) to be accessed from within Practice Manager:

1. Go to **Add-ins → Run → Configure**.

2. Configure as follows:

    Application Name - Type **New York State Immunization Information System (NYSIIS)**

    Command Line – Type **C:\Program Files\Internet Explorer\iexpore.exe https://commerce.health.state.ny.us**

    Starting Directory – Type **C:\Program Files\Internet Explorer**

3. Click the **Add** button and then click the **OK** button.

<u>We do not support the NYSIIS</u>. The New York State Immunization Information System User Manual can be used, by the client, to assist them in uploading the applicable file to the NYSIIS. The User Manual can be found by going to:
http://www.health.ny.gov/prevention/immunization/information_system/docs/user_manual.pdf